



# AR Portal User Guide

## Notifying a Claim

## Introduction

The purpose of this document is to outline the processes and guidance for the Appointed Representative Portal

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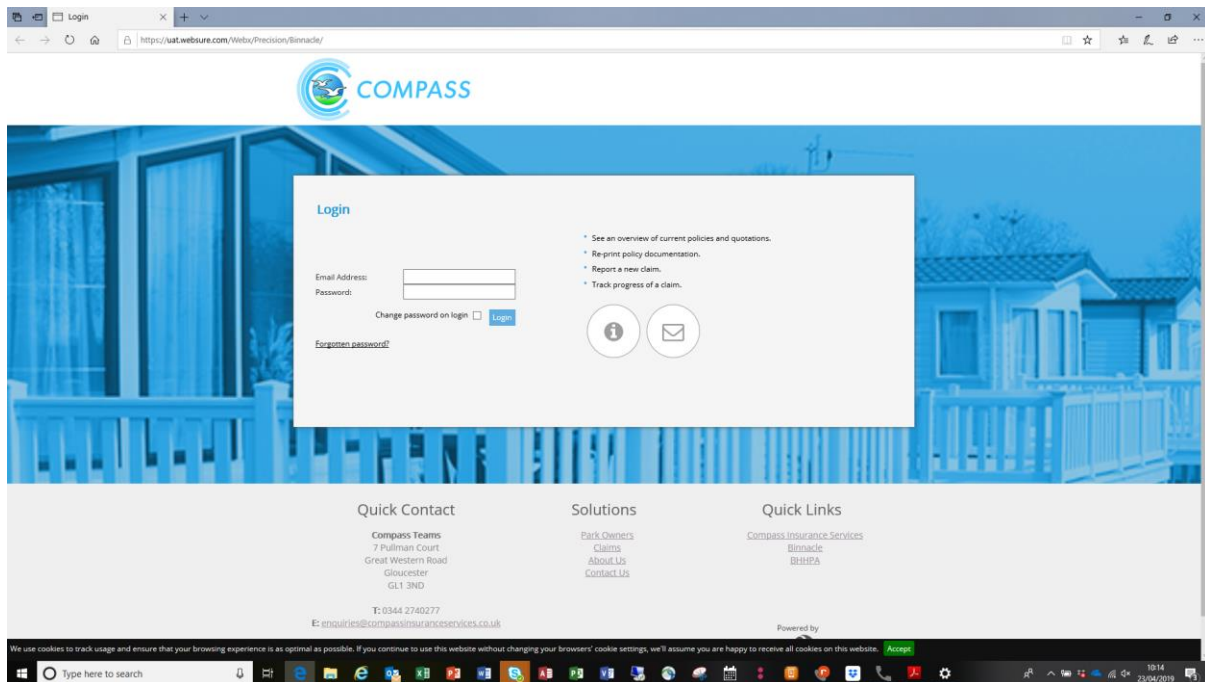
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## Logging In

The following link enables you to access the login screen

<https://portal.compassinsuranceservices.co.uk/Extranet/>

This will bring up the following screen



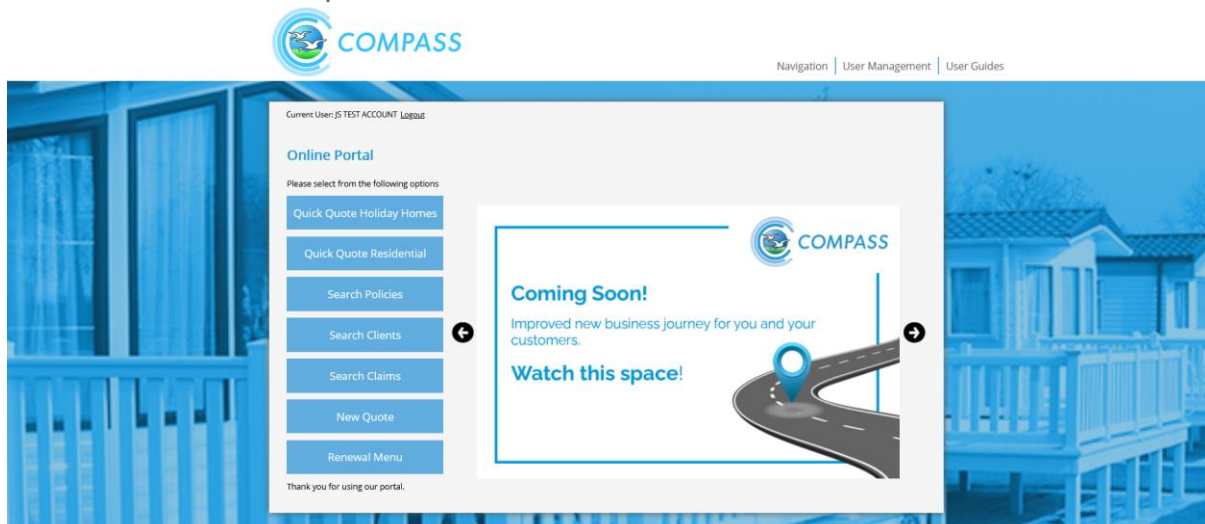
You will be issued with

- Username
- Password

Enter these into the fields shown and click **Logon**

## Basic Navigation

The home screen of the portal is as follows



From this screen there are quick links to

- Quick Quote Holiday
- Quick Quote Residential
- Search Policies
- Search Clients
- Search Claims
- New Quote
- Renewal Menu

At the bottom of the screen there are also links to Compass information and websites for the user to follow.

The Navigation drop down also allows the user to access various parts of the Portal from any screen in the portal.

The portal does not allow use of the **Back** button on the users browser and navigation through the screens should only be done using the navigation built into the portal itself



### Oops!

Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

Okay

## User and Data Hierarchy

The portal stores the following accounts

Account	Description	Relationships
Policy	The policy and all corresponding risk data	A policy can only have one Client, one Park and one AR
Client	The client and all corresponding data	A client can have multiple policies across multiple Parks and under multiple Ars
AR	The account under which the parks, clients and policies are held	An AR can have multiple Parks on which there are multiple clients with policies. Each AR can also have multiple users
Park	The account that drives the rating, commission and terms applied to policies	A Park can only be linked to one AR but can have multiple Clients and Policies on it
User	The account that drives the transactions on the portal	A User can only access the AR they are linked to and can access multiple Parks, Policies and Clients. Access can be restricted to a single Park within the AR

## Submitting a Claim

You can submit a claim from the Policy Menu, go to the 'Search Policy' option from the dropdown menu

The screenshot shows the COMPASS web application interface. The main content area displays the 'Policy Menu - Holiday Homes - Mr Caravan Owner'. The policy details are as follows:

Proposer:	Mr Caravan Owner	Policy Status:	OnRisk
Cover From:	14 July 2019	Cover To:	30 May 2020
Agent:	Foxhouses Park Ltd	Commission:	£84.83
Correspondence Address:	42 Malham Drive, HARROGATE, North Yorkshire, HG3 2YR, United Kingdom		

Below the details is a table with columns: Year, Status, Sub Status, Quote Date, Cover From, Cover To, Total Premium, Total Log/Party, and Select. The table contains one row for the year 2019 with status 'OnRisk' and a 'Select' button.

The 'Main Menu' dropdown is open, showing options: Search Policies (highlighted), Search Clients, Search Claims, Add Quote, Add Client, Logout, and Currency (United Kingdom, £).

Then use the criteria to find the policy you need, and press 'Select'

The screenshot shows the COMPASS web application interface with the 'Search' page. The search criteria are as follows:

Policy Holder:	<input type="text"/>	Property Type:	Select a property type
Quote ID:	<input type="text"/>	Park:	Foxhouses Park
Certificate Number:	<input type="text"/>	Pitch Number:	23
Status:	OnRisk	Policy Type:	Select a policy type

Below the search criteria is a 'Search' button. The search results table is as follows:

Policy Holder	Property Type	Park	Pitch No	Status	Cover From	Cover To	Quote Date	Quote ID/Certificate No	Select
Mr Caravan Owner		Foxhouses Park	23	OnRisk	14/07/2019	30/05/2020	08/07/2019 10:11:15	CMPC005015/893415	Select
Rural Insurance		Foxhouses Park	123	OnRisk	07/06/2019	30/05/2020	07/06/2019 15:15:30	893415	Select

The following screen will appear

**Policy Menu - Holiday Caravan/ Lodge Insurance - Mr James Stout**

**Proposer:** Mr James Stout      **Policy Status:** OnRisk  
**Cover From:** 24 August 2021      **Cover To:** 31 May 2022  
**Agent:** xxxxxxxx xxxx xxx

**Correspondence Address:** 10 Yetis P R Ltd, 9 Pullman Court, Great Western Road, Gloucester, Gloucestershire, GL1 3ND, United Kingdom

Year	Status	Sub Status	Quote Date	Cover From	Cover To	Total Premium	Tax/Levy/Duty	Select
2021	OnRisk		24 August 2021	24 August 2021	31 May 2022	£356.97	£38.25	Select

**Holiday Caravan/ Lodge Insurance**  
**Policy No:** 24556805  
**Client ID:** CMPC813555  
**Cert No:** CMPCHH2124556805

**Proposer:** Mr James Stout  
**Country:** United Kingdom  
**Currency:** £

- Client Details
- MTA Quote
- Documents
- Claims**
- Cancel
- Exit

Select the 'Claims' option to bring up the following screen

**Claim Summary - Holiday Homes - Mr Caravan Owner**

**Record ID:** 898265      **Policy Status:** OutRisk  
**Policy Holder:** Mr Caravan Owner

**Claims already made:**

Claim Ref	Loss Date	Repaired/Claim	Details	Status	Progress
No Data					

**Holiday Homes**  
**Record ID:** 898265  
**Client ID:** CMPC05015  
**Cert No:** CMPCHH1898265

**Proposer:** Mr Caravan Owner  
**Country:** United Kingdom  
**Currency:** £

- Policy Menu
- Add a new claim

**Quick Contact**  
Compass Teams  
7 Pullman Court  
Great Western Road

**Solutions**  
Park Owners  
Claims  
About Us

**Quick Links**  
Compass Insurance Services  
Binnacle  
Binnac

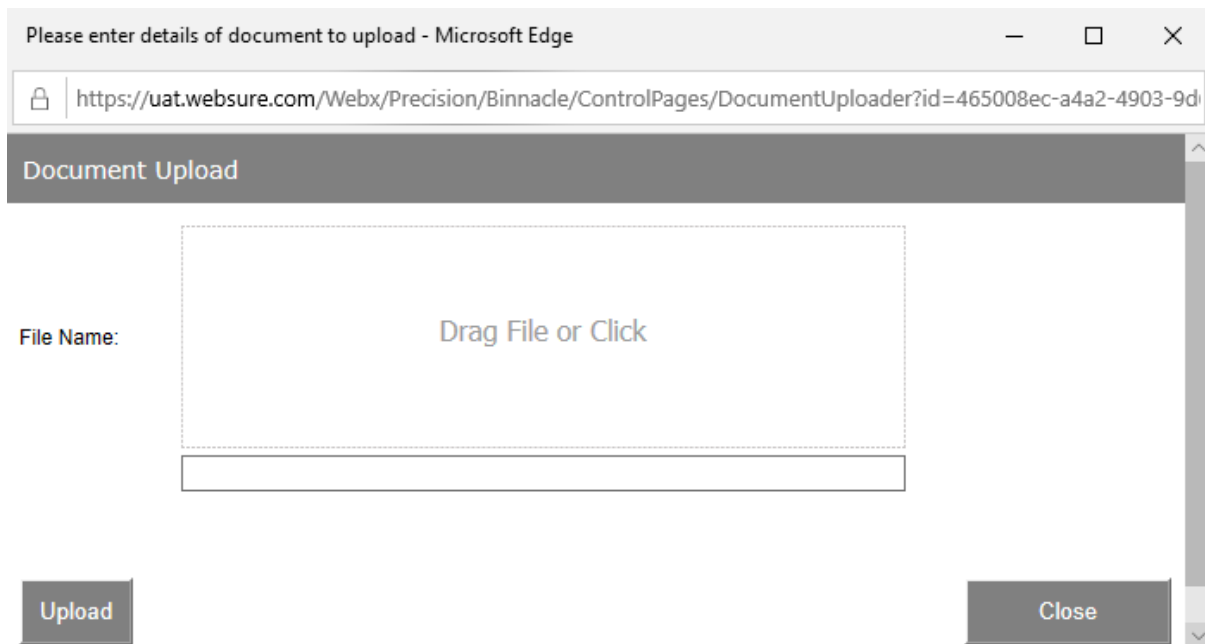
Select the 'Add a new claim' option

You will need to complete the following fields

Field Title	
Date of Loss	The date the incident occurred. If this is not known exactly i.e ingress of water discovered at a later date then select today's date
Reported Date	This will default to today's date
Loss Code	This is the type of loss suffered, the most common types are (this can be changed after you have notified us if the cause turns out to be something different) Accidental Damage – damage that is accidental Damage to Caravan – damage to the structure Damage to Contents – damage to the contents Escape of Water – water escape internally Flood damage – damage due to flooding Storm damage – damage due to storm
Details	Give a good description from the client of what happened, when it happened, and any parties involved
Please provide estimated loss amount:	An estimate of the cost of the loss



You can also upload any documents such as a claim form, photographs etc by using the document upload option



Once all the information is entered then click 'Submit this Claim'

The claim now shows on the policy

